



CLIENT ACCOUNT CAMPAIGN

Talk Series 9

PENANG

19 Nov 2026 (Thursday) | 2:00 pm to 5:45 pm

Online via



Microsoft Teams

Registration Fees

Member of the Bar	RM30
Pupil in Chambers and	
Law Student	RM15
Non-Member	RM60

This is an online event

[Register here](#)

CPD Code: T3/19112026/BC/PGB261206/3.5
CPD Points: 3.5

As part of the Client Account Campaign launched on 21 June 2025 by the Bar Council Risk Management and ELEVATE Committee ("RMEC") (previously known as the Bar Council Risk Management Committee), which can be viewed [here](#), the committee is organising a series of focused talks aimed at promoting awareness and best practices in managing client accounts. Through this initiative, lawyers will be able to better understand the responsibilities of being a sole proprietor or partner and manage client accounts prudently.

The talk is divided into the following three parts, which may be conducted in any sequence, provided all parts are completed:

Part I:

- ♦ *Getting Started!* Focus: Should We Be Partners?
- ♦ The Lawyer's Guide: Stakeholders' Duties and Responsibilities When It Involves Money

Part II:

- ♦ Accounting of Clients' and Office Accounts and Taxation for Law Firms
- ♦ Claims Under the PII Scheme

Part III:

- ♦ *Getting Started!* Focus: Fundamentals of Legal Practice
- ♦ The Lawyer's Guide: Leaving Practice and Closing a Law Firm

Tentative Programme:

1:30 pm	Registration
2:00 pm	The Lawyer's Guide: Stakeholders' Duties and Responsibilities When It Involves Money
3:30 pm	Accounting of Clients' and Office Accounts and Taxation for Law Firms
5:00 pm	My PII – 2026 Professional Indemnity Insurance Policy: Coverage, Exclusions and Conditions
5:45 pm	End

(1) The Lawyer's Guide: Stakeholders' Duties and Responsibilities When It Involves Money

Lawyers deal with many stakeholders: clients, courts, regulators, staff and members of the public. Each has different expectations, but all require trust, honesty and accountability. This session will discuss common mistakes in handling client accounts, examples of mismanagement, and how to protect yourself and your firm. This session also aims to help lawyers build a responsible practice and avoid serious consequences such as complaints, disciplinary actions or even criminal charges.

Speaker: R Jayabalan



R Jayabalan graduated with a Bachelor of Laws (Hons) degree from the International Islamic University Malaysia ("IIUM") (1996) and holds a Master of Business Administration ("MBA") degree, also from IIUM (2005). He was admitted as an advocate and solicitor of the High Court of Malaya in April 1997 and has been an active trial and appellate litigator since then. His areas of practice include professional liability, employment law, medical negligence and personal injury claims, contract and commercial disputes, and judicial review, among others.

Jaya is currently the Secretary of the Malaysian Bar and a member of the Bar Council. He is also the Co-Chairperson of RMEC. He previously served as the Treasurer of the Malaysian Bar and Chairman of the Johore Bar Committee, and chaired several Bar Council committees. He actively speaks at seminars and training sessions for lawyers and writes on legal issues and matters of interest to the legal profession. He is also the author of *Jaya's Civil Trial Handbook – Essential Practice & Procedure for Malaysian Courts* (2025).

(2) Accounting of Clients' and Office Accounts and Taxation for Law Firms

This session discusses the importance of managing law practice accounts, providing guidance on good accounting practices, including understanding solicitors' accounts, record-keeping and invoicing, and tax requirements for professional services. This talk is suitable for lawyers who are interested in learning how to handle or improve the management of their law practices' accounts.

Speaker: Heron Khalid Goh



Heron Khalid Goh read law at the University of Wolverhampton, England and obtained his MBA in finance from the University of Hull, United Kingdom. He is an associate member of the Singapore Institute of Arbitrators. With over 30 years of experience in tax compliance, advisory, audit and management across diverse industries, he joined MustaphaRaj in 2016,

bringing extensive expertise in governance and regulatory alignment.

Since 2008, he has delivered talks to Members of the Bar and advised publicly listed companies, while also assisting government agencies and litigators in enforcement matters. He has completed the Professional Diploma in Corporate Anti-Corruption Management ("PD CAM") (London Examinations Board-accredited), which was confirmed by the Anti-Money Laundering and Anti-Corruption Academy Malaysia. He is also a PD CAM-certified professional under the Association of Certified Professionals and was formally recognised as the first Singapore-based participant to obtain this accreditation.

(3) My PII – 2026 Professional Indemnity Insurance Policy: Coverage, Exclusions and Conditions

This session will provide an overview of the coverage and terms of the 2026 Professional Indemnity Insurance ("PII") policy, including how PII can help protect lawyers and their firms against claims arising from professional negligence. It will also explore practical risk management measures that lawyers can implement in their daily practice to minimise the risk of negligence claims and strengthen their firms' risk management practices.

Speaker: Sheelaa Ragavan



Sheelaa Ragavan read law at Multimedia University and holds a Master of Laws degree from Universiti Malaya. She began her career in civil litigation before moving into the insurance industry, where her work has focused on professional indemnity and financial lines in Malaysia and Singapore. She has been closely involved with the

Malaysian Bar PII Scheme and now leads Aon's work on the Scheme. In this role, she oversees claims and day-to-day scheme operations, supports the Malaysian Bar on programme structure and renewal strategy, and works with insurers and other partners to deliver the Scheme for Members of the Bar. Drawing on her background as a former practising lawyer, she brings a practical understanding of law-firm risk and the realities of legal practice to her work in insurance.

Event Policy

Places are limited and registration is on a first come, first served basis. The registration for this session will close on **19 Nov 2026 (Thursday)**, at **12:00 pm**.

For events with registration fees, all payments must be made in advance, including bank charges. Registration will be confirmed once proof of payment is provided by email or fax, and full payment is received.

The organiser reserves the right to modify, cancel or postpone the event, should circumstances arise that make such action necessary, whereupon all registration fees paid will be refunded.

Cancellation

Cancellations must be made in writing.

Please note that there will be **no refunds** for cancellations, but substitutions are allowed. Kindly inform us in writing with the relevant details at least **three** days in advance.

If you have failed to inform the organiser on your cancellation for **three** consecutive times, you may be blacklisted for future events.

Transferral

You are allowed to transfer your place to another participant, but you must notify the organiser with the necessary details at least **three** days in advance.

Attendance

CPD points for the CPD Scheme will not be awarded to lawyers and pupils in chambers from Peninsular Malaysia who arrive more than 15 minutes late, are not present throughout the event, or leave before its scheduled end.

Privacy

The personal information that you provide to the Malaysian Bar, whether now or in the future, may be used, recorded, stored, disclosed or otherwise processed by or on behalf of the Malaysian Bar for the purposes of facilitation and organisation of this event, research and audit, maintenance of a participant database for the promotion of this event, and such ancillary services as may be relevant.

Disclaimer

- Materials (if any) will be emailed only. No printed notes will be provided.
- No recording of the event is permitted via any means at any time.
- No part of the event content may be used / reproduced in any form without the written and explicit consent of the Malaysian Bar and speaker(s).



Scan the QR code for more info on risk management.



Organised by
Bar Council Risk Management and
ELEVATE Committee

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